A step-by-step analysis of the past 12 months + a blueprint to success for the year ahead

MASTER PLAN
FOR MY BEST YEAR YET

THIS MASTER PLAN BELONGS TO: ____________________________________________

IT WAS COMPLETED ON: ________________________________________________
The turning of the calendar to a new year holds the promise of a fresh start on your entrepreneurial adventure. There’s a rare break in the action—a precious few moments of calm on an otherwise frenetic journey. I hope that this season delivers not just a blank slate but renewed energy, too, as I have little doubt that your soul is due for some R+R after the holiday rush.

Entrepreneurship is a wild ride, and we’re in the midst of an especially exciting time. Barriers to entry are dropping and people the world over are showing increasing interest in beautifully designed products that created with soul and intention. As business owners working in the midst of the maker revival, it’s fantastically easy to be swept away by a wave of passion, making decisions on the fly, and moving from one urgent task to the next.

I designed this project to provide an opportunity for introspection and reflection at the year that was while planning for the year ahead. The simple prompts on each page were carefully cultivated to help you harvest vital information about recent victories and challenges. By the end of this exercise, you’ll have a strong foundation infused with structure and vigor to fortify you on the next leg of the journey.

I recommend printing a hard copy of the packet and carving out several hours to dive in and really get your hands dirty. Access to your basic sales data will prove helpful, but that should be easy enough to cull via your e-commerce platform or accounting software. The only tools needed are that sales data, a pen, a clear mind, and a quiet space. Wine and warm blankets are optional but highly recommended.

Try not to rush and resist the urge to skip the sections that challenge you. In fact, the queries that you find most challenging are typically the areas of your empire that would enjoy the greatest benefit from increased focus. These dark corners have likely received less attention and/or proven to be stumbling blocks in the past. Don’t resist them… directing heightened focus towards the facets of entrepreneurship that perplex you will undoubtedly evolve last year’s challenges into next year’s victories.

I want to encourage you to be as honest as possible in your answers. The amount of benefit you’ll derive from this exercise is in direct proportion to the authenticity and clarity of your answers. There are no right or wrong answers… only your answers. Once you’re finished, I hope you’ll file this packet away and revisit it in a year’s time. I have a feeling that you’ll be incredibly encouraged to see your progress from year-to-year in black and white.

May the coming year bring both focus and fulfillment. The Lucky Break team will be cheering you on as you tackle new trials, expand beyond your comfort zone, and press ever-closer to the empire of your dreams.

With every warm wish for your success,

Lela Barker
C.E.O. (Chief Empire-Building Officer) at Lucky Break
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LOOKING BACK AT THE PAST YEAR

REVENUE + EXPENSES

Did you reach your revenue goal for last year? _______________________________________________

If not, what specific steps or decisions could have been taken to get you closer to it?
1. 
2. 
3. 

In what month of the past year did you make the most money? -------------------------------------
What was responsible for the revenue boost that month?

In what month did you make the least money? -------------------------------------
Why do you think that was?

What strategies can you implement in the coming year to avoid the revenue dip you just described?
The best investment in your business last year was...

Because it helped you to...

On the flip side of that coin, you also spent money on...

But it didn’t yield results because...

MARKETING
What marketing strategies from the past year worked to bring increased brand awareness, a boost in sales or increased brand cachet? Perhaps it was a show you participated in, a collaboration you built, a commitment to regular blogging or newsletters, increased social media interaction, launching a new product, an adjustment to your website or product photography. Zoom out and name 3 things that made a noticeable difference over the past year.

1. 

2. 

3.
What marketing strategies failed to yield the anticipated traction?
1. 

2. 

3. 

Can you rework those strategies to make them more effective? If so, how?

On what social media platform did you enjoy the most success? ________________________________

What made those interactions so successful and how can you enrich them for the new year?

What social media platform was least successful? ________________________________

Does the platform still hold promise for your brand? If so, how can you amend your strategy for the coming year?

Review the email newsletters you sent to your customers last year. Which 3 had the highest open rates?
1. 

2. 

3. 
What were the subject lines?
1.
2.
3.

Which links embedded in each of those emails enjoyed the most clicks?
1.
2.
3.

What day + time of day were those newsletters dispatched?
1.
2.
3.

What other content was included in the newsletter?
1.
2.
3.
Describe the photos you incorporated into those newsletters. What did the images feature? What was distinctive about them?

1.

2.

3.

What insight did this review yield about newsletter subject lines, imagery, content, and timing and how can you use those insights to increase newsletter opens and interaction in the coming year?

PERSONAL PRODUCTIVITY + SATISFACTION

What business activities did you spend time on over the past year that didn’t deliver results?

1.

2.

3.

Do you need to continue those activities? If so, what can you change to make them more meaningful or successful?
What facet of the business did you enjoy most last year? ____________________________________________
How can you do more of that?

What facet of the business did you enjoy least? ____________________________________________________
How can you do less of that?

Reflect back on your business last year. Describe that reflection in six words or less.

What were you most grateful for about your business last year?
1. 
2. 
3. 

What was the single wisest decision you made last year?

What was the biggest lesson you learned?
What was the biggest surprise of the last 12 months?

What was the biggest risk you took?

What are you most proud of from the past year?

Which three people who most influenced you over the last 12 months?

What were you not able to accomplish last year?

What obstacles prevented you from accomplishing those things?

List the 3 biggest accomplishments of the last year.
1.
2.
3.
What specific action steps did you take to achieve those results?

Who help you achieve those successes?

List the 3 biggest challenges of the last year.
1.
2.
3.
Who or what helped you overcome those challenges?

What did you learn about yourself while working through these challenges?
PRODUCT REVIEW

What were the 3 best-selling products of the last year?

**Product 1:** ____________________________________________

How much did you sell?

Why was it so successful?

**Product 2:** ____________________________________________

How much did you sell?

Why was it so successful?

**Product 3:** ____________________________________________

How much did you sell?

Why was it so successful?

How can you apply the elements that made those 3 products so successful to the rest of your product collection?
What were your 3 slowest-movers over the last 12 months?

**Product 1:** ____________________________________________________________

How much did you sell?

Why did it fail to get traction?

Is the product worth rehabbing? YES / NO

If so, what changes can you implement to get it into fighting shape?

**Product 2:** ____________________________________________________________

How much did you sell?

Why did it fail to get traction?

Is the product worth rehabbing? YES / NO

If so, what changes can you implement to get it into fighting shape?
Product 3: _____________________________________________________________________________________

How much did you sell?

Why did it fail to get traction?

Is the product worth rehabbing? YES / NO

If so, what changes can you implement to get it into fighting shape?

RELATIONSHIP BUILDING

Who were your top 5 customers of the past year?
1. 
2. 
3. 
4. 
5. 

What can you do to show your appreciation to those customers and continue building the relationships?
Did you launch any collaborations over the past year? Would you consider them successful? If so, what can you do to continue nurturing the relationship with your collaborators? If not, what could have been done differently to improve the success of the collaboration?

Did you receive any editorial press last year in blogs, newspaper, or magazines? If so, how did you make the connections that lead to the press coverage? Did that coverage lead to increased sales or more brand credibility? How did you leverage it?

LOOKING FORWARD

REVENUE + EXPENSES
What’s your revenue goal for the coming year? ________________________________

Name 3 steps you’ll take to get yourself to that goal.
1.  
2.  
3.  
What's a revenue goal for the upcoming year that everyone would say you’re absolutely nuts to aim for?

P.S. I want you to aim for that figure.^^^  

Name 3 specific strategies that could get you a hell of a lot closer to that goal.  
1.  
2.  
3.  

What investments will you make in your business over the next 12 months, when do you plan to make them, and what do you hop those investments will achieve?

BRAND DEVELOPMENT  
What do you want your brand to be known for in the coming year?  

Name 3 specific steps you can take in the new year to establish brand credibility in that arena.  
1.  
2.  
3.
How do you want your customers to feel when interacting with your brand?

Name 3 specific steps you can take in the new year to help them realize those feelings.
1. 
2. 
3. 

Physically gather as many of these pieces of brand collateral as possible: One of each of your packaged products, your business card, your linesheets, catalogs, order form, any brochures or postcards related to your brand, etc. Spread them out on the kitchen table or living room floor. Park yourself amongst them with a laptop opened to your website. Now, try to see these components with fresh eyes as if you were a brand new customer interacting with your company for the first time. Answer these questions:
1. Is any part of your brand presentation out of step? If so, what’s out of sync and how can you bring it into alignment?

2. What’s the strongest piece of the brand collateral that you see in front of you?

3. What’s the weakest piece of brand collateral that you see before you? What can you do to improve it?

4. Really try to get into the brain of a person seeing all of this for the first time. What do you think their impressions of your company would be? Are you pleased with those impressions? If not, what can you do to change them in the coming year?
MARKETING

What do you commit to doing more of in the next 12 months to build brand awareness?

Develop 3 promotions for the coming year and sketch each of them below.

**Promotion #1:**

What are your goals for this promotion?

How and when will you execute it?

**Promotion #2:**

What are your goals for this promotion?

How and when will you execute it?
Write down the one store you’d love to work with. The one that makes you weak in the knees. The one that you’re crazy for even contemplating. YES, THAT ONE.

Brainstorm below what steps you need to take to get ready for that pitch.
Promotion #3:

What are your goals for this promotion?

How and when will you execute it?

**PERSONAL PRODUCTIVITY + SATISFACTION**

Describe your hopes for the business in the coming year in six words or less.

When you visualize the next 12 months, what excites you?
1.
2.
3.

What stressors do you anticipate encountering in the coming year? Use the space below to carve out a plan for dealing with them.
Sometimes the magic isn’t in what we do differently in a new year, but what we stop doing altogether. List 3 things you vow to stop doing this year.

1.

2.

3.

List 3 daily habits you’ll adopt to improve your physical and/or mental health.

1.

2.

3.

PRODUCT DEVELOPMENT

What products do you plan to launch over the next 12 months? Most brands launch at least one new collection per annum, focused around the holidays (but available for sale as early as June or July). A “spring” collection (available in January or February) is sometimes offered as well. Think strategically about what products you’ll develop, when they’ll launch, and how you’ll promote their release. Use as many or as few of the blanks below as you feel necessary- no need to plan product launches simply to fill up space!

Product #1:

Anticipated Launch:

Anticipated Price Point:

Promotional Push:
Product #2:

Anticipated Launch:

Anticipated Price Point:

Promotional Push:

Product #3:

Anticipated Launch:

Anticipated Price Point:

Promotional Push:
Product #4:

Anticipated Launch:

Anticipated Price Point:

Promotional Push:

Product #5:

Anticipated Launch:

Anticipated Price Point:

Promotional Push:
Product #6:

Anticipated Launch:

Anticipated Price Point:

Promotional Push:

Product #7:

Anticipated Launch:

Anticipated Price Point:

Promotional Push:
Product #8:

Anticipated Launch:

Anticipated Price Point:

Promotional Push:

**RELATIONSHIP BUILDING**

What media outlets or blogs do you hope will cover your products in the coming year? How can you build the relationships needed to get them there?

What collaborations would you like to build over the next 12 months?
“KICKING THE YEAR OFF RIGHT” CHECKLIST

○ REVIEW YOUR SALES DATA.
Pull it directly from your e-commerce platform or accounting software and lay your eyes on total revenue and revenue-by-product. Don’t rely on your memory or your perceptions of what sold over the past year. Pull the numbers and get down-n-dirty with them. They don’t lie!

○ REVIEW YOUR PRODUCT COSTS.
Go through your product costs with a fine-tooth-comb. Raw material prices have a tendency to slowly creep up unnoticed throughout the year. Double-check your raw material costs, labor expenses, and overhead to see if a price adjustment is needed. If you have my Price-O-Matic software, then updates are blissfully easy! Pull the most recent invoice for each raw material and update the costs in the “Inventory” tab of the POM software. The system will automatically search for that raw material in every product you make and instantly retabulate the costs of each product made with that raw material. Technology is beautiful, eh? If you don’t yet have my Price-O-Matic software, then you’re wasting time and leaving money on the table! Why not grab a copy?

○ GET YOUR INBOX TO ZERO.
This is what I lovingly call “The New Year Purge.” All of those stray emails that have collected for months need to TLC ASAP. Set aside a few hours and quickly go through your entire inbox. Answer whatever is outstanding and discard the rest. You have no idea how good a “zero inbox” feels until you’ve experienced it! A clear space allows you to start the new year off right.

○ CLEAN OUT YOUR OFFICE.
Continuing on that theme: Tidy up your workspace. Remove clutter, file or discard papers, and reorganize if needed. Whipping your office into shape changes the way you feel when you sit down at your desk and is well worth the investment of an hour or two.

○ TURN OFF YOUR NOTIFICATIONS.
You know all those things that buzz, ding, and whirl? They need to die a swift death! The perpetual inundation of alerts and notifications contributes to mental overwhelm and they break focus every single time they make noise. You needn’t be notified when someone places an order, sends an email, favorites a picture, likes your page, or shouts you out on Twitter. Remove all audible notifications and ensure that your email isn’t auto-checking throughout the day. Do whatever you need to do to set up these systems so that you’re in control of when you review information, not the other way around!
UNSUBSCRIBE + THEN RESUBSCRIBE TO YOUR OWN NEWSLETTER.

Whaaat? No, I haven’t been drinking! By unsubscribing and then resubscribing, you’ll have an opportunity to see copies of all the emails you programmed a looong time ago into MailChimp, etc. The information you share in those autoresponder emails is especially important because it’s some of the first information you present to new customers, but we often “set it and forget it.” Give it a good once-over and update as necessary. Is it up-to-date? Is it relevant? Is it in your brand voice? Make adjustments as necessary.

MOVE THROUGH YOUR WEBSITE AS A CUSTOMER.

Click through and read every last page of your own website. Keep an eye out for outdated or inaccurate information. Place any single item in your cart and complete the entire checkout process. Double-check the order confirmation email you receive to ensure that it’s formatted well and up-to-date.

CHECK FOR BROKEN LINKS.

Use this uber-cool (and free!) broken link checker to identify misdirecting links on your own website. Simply pop your website address into the box in the upper-right corner and it will magically find every stray link that isn’t functioning as it should. While this tool can find broken links, it can’t fix your broken links. Make certain that you get into the backend of your website and reprogram them to direct peeps to the right spot in the coming year.

LET GO OF FRUSTRATIONS, BETRAYALS, AND PERCEIVED FAILURES.

I’m not in the business of quoting Disney Princesses in my day-to-day life, but I have to hand it to Elsa: that chick really knows how to let go. Make like Elsa and let go of any angst that you’re harboring. This may sound a bit “woo-woo” but stay with me for a moment...it’s incredibly cathartic. I like to take a handful of index cards and write a single grievance on each one. Be it frustration with myself, displeasure with a teammate, jealousy of a competitor, or the disappointment in an unrealized expectation—inscribe those cards with whatever plagues you. Then start a good fire and release them one-by-one! I read them aloud individually, toss them into the flames, and allow myself to feel the release as each one crackles. I envision myself feeling lighter as my cares from last year melt into ash. Whatever happened exists exclusively in the past, unless we allow ourselves to be burdened by the energy. Make a conscious decision not to carry that energy into the new year.

SET ONE “BIG PICTURE” GOAL PER MONTH.

As entrepreneurs, we have a lot of plates spinning in the air every day! It’s incredibly easy to stay busy all year long without actually moving your business forward. I like to choose one “big picture” goal each month to ensure that I’m constantly stepping up my game. It could be new product photos, rewriting product descriptions, doing some media outreach, developing new product offerings, doing a cost analysis, exploring collaborations, etc. I recommend plotting a single Big Picture Goal each month and then directing all spare time + energy towards stepping up your game in that one facet of business. I designed a worksheet on page 29 to get you started!
SOCIAL MEDIA TRACKER

“That which is measured, improves.”

That’s an oft-repeated rallying cry in the entrepreneurial world, but truer words have never been spoken. I’ll bet a cocktail and a pedicure that if you set aside some time in the coming year to measure your social media following, then those numbers will grow exponentially compared to last year.

Remember that you needn’t be on every social media platform. Trying to be “everywhere” will result in diluted content, wasted time, and higher-than-healthy wine consumption. My recommendation: pick 2-3 platforms where your target audience congregates and focus on producing higher quality, more consistent content for those specific platforms. Ignore every social media platform, save for those few on which you’re choosing to focus.

Post this smart little guide in your workspace to track social media growth over the coming year. Print this page and jot down the number of followers you have currently have on each platform for this month. Then spend a couple of minutes programming a reminder into your smartphone, prompting you on the first day of each month to circle back to this tracker and record the follower count on the first day of the month for the rest of the year. Good luck!

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BIG PICTURE GOALS

ONE... that’s the magic number! Select one area of your business each month and direct every spare moment of time and morsel of energy in that direction. Divided focus is one of the biggest stumbling blocks for makers and product designers. Don’t let it get you down this year!

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